A6635-4U 12/86

A SPECIAL REPORT FROM

Research & Planning

GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1986

National Association of Broadcasters
1771 N Street, N.W.
Washington, D.C. 20036-2898

GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1986

by

Herbert H. Howard, Ph.D.

Professor of Broadcasting
and Assistant Dean

College of Communications
The University of Tennessee
Knoxville, Tennessee 37996

May 1986

[c] Copyright May 1986

National Association of Broadcasters

THE AUTHOR

Dr. Herbert H. Howard, a Professor of Broadcasting, is the Assistant Dean for Graduate Studies & Research in the College of Communications, The University of Tennessee, Knoxville. He holds the Ph.D. degree in Mass Communication from Ohio University (1973). His research specialties are media ownership and new technology.

Dr. Howard's address and telephone numbers are as follows:

Dr. Herbert H. Howard
98 Communications Bldg.
The University of Tennessee
Knoxville, TN 37996

Telephones: (615) 974-4451 (office)

(615) 577-8378 (home)

GROUP AND CROSS-MEDIA OWNERSHIP OF TELEVISION STATIONS: 1986

A new era for broadcast group ownership in the United States began in 1985. After limiting multiple-station ownership for 31 years, the former "7-7-7 rule," adopted by the Federal Communications Commission in 1953,[1] was replaced by a new and more liberal order.[2] The new multiple-ownership rule, adopted in 1984, allows a single owner to hold licenses for as many as 12 television stations, as long as the group's total audience reach does not exceed 25% of the nation's TV households. The rules for radio ownership also were relaxed in the FCC's order, with each owner permitted to hold up to a maximum of 12 AM and 12 FM stations. Effective dates for the higher limits were set for March 4, 1985, for radio, and April 2, 1985, for television.

Under the new rule, household coverage for each group owner is based on the Arbitron Company's estimate of TV households (in percentages of the national total) in the Areas of Dominant Influence (ADI) where the group's stations operate. Because of coverage differences between VHF and UHF television, UHF stations count only 50% of the market percentages toward the 25% ceiling. This discount applies to all UHF stations since the FCC did not distinguish between UHF stations in mixed and all-UHF markets.

In addition to expanding the number of TV stations allowed per owner, the Commission's latest multiple ownership rules also dropped the proviso that a full complement of stations must include at least two UHF facilities. The portfolio of stations now may consist of any 12 non-overlapping stations.[3]

Two other ownership rules were not affected by the FCC's 1984 action. The duopoly rule, first adopted in 1943, prohibits common ownership of more than one station of each type in a given market area,[4] and the cross-media ownership rule forbids the establishment of new media combinations involving TV stations, daily newspapers, and radio outlets that serve the same community.[5] The number of commonly-owned local TV-newspaper combinations has dropped sharply since the adoption of the cross-media rule in 1975.

Almost immediately after the new "12-12-12 rule" went into effect, the ownership of the television industry began to undergo significant structural change. Before 1985 ended, one group (Taft) reached the limit of 12 TV stations through a buy-out of another group; and several other companies increased their holdings to more than seven stations. The merger of a major TV group and a network company (Capital Cities Communications and ABC) resulted in an ownership with coverage of more than 24% of the nation's ADI television households even though that newly-combined organization only has eight TV stations. Numerous other mergers, acquisitions, and buyouts have occurred or are planned since the rules were changed last year. (See footnote 12.)

This study was undertaken to provide current data on (1) TV station multiple ownership, (2) cross-media ownership involving co-located television stations and daily newspaper properties,

and (3) newspaper-TV affiliations not involving cross-media ownership. Particular attention has been given to ownership trends. In addition, the percentages of the nation's television households reached by various station groups has been tabulated, using the FCC's national market reach formula, as well as net weekly circulation (NWC) values.

One of a continuing series of studies by the author, this report presents a statistical profile of television station ownership as of January 1, 1986.

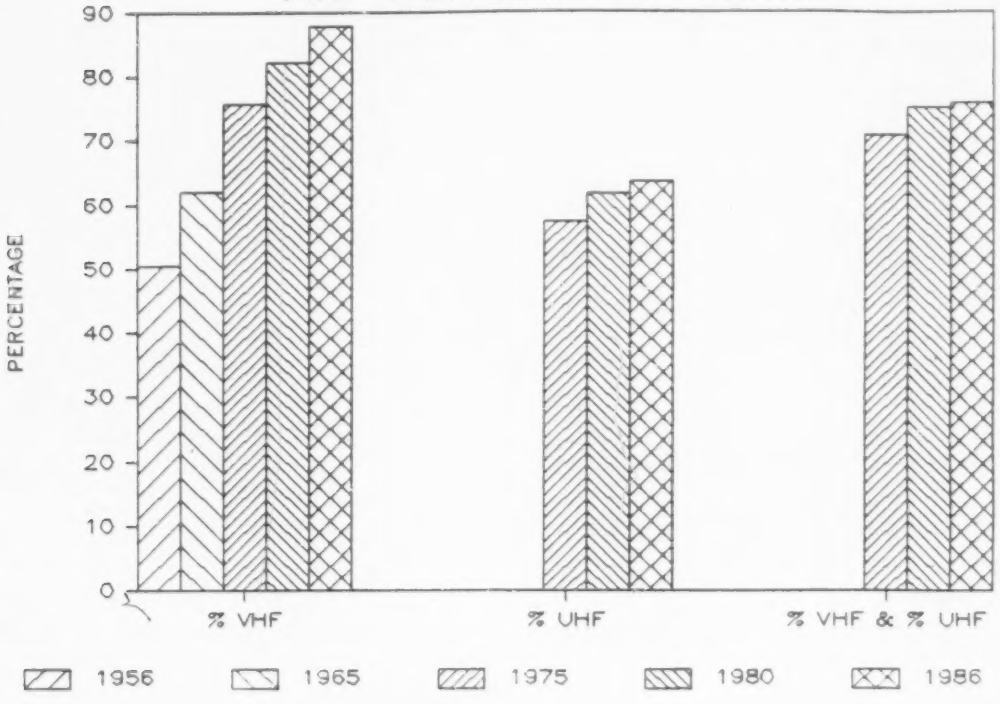
Historical Background

Group ownership of radio and television stations is a long established characteristic of broadcasting in the United States. It began in the early 1920's when Westinghouse established radio stations in Pittsburgh, Boston, Chicago, and other cities. Numerous radio groups existed prior to World War II, and TV group ownership emerged with the beginning of television service in the post war era. As shown in Figure 1, TV group ownership has grown steadily since rules governing the practice were first adopted. In 1956, three years after the FCC established the ownership limits, more than half of the VHF stations in the top-100 markets were group owned. Today, nearly 9 of every 10 VHF outlets in those markets are licensed to multiple-station owners.

Historically, group ownership of UHF properties developed at a slower pace. However, during recent years, acquisition of UHF stations by group owners had accelerated sharply as their economic potential has increased. At the same time, the <u>percentage</u> of

FIGURE 1

GROUP OWNED STATIONS IN TOP-100 MARKETS



SOURCES:

1956 - FCC, Network Broadcasting: Report of the Network Study Staff to the Network Study Committee. (Washington: U.S. Government Printing Office, 1958), p. 163.

1965 - Television Multiple Ownership Rule, 5 R.R. 2d 1609 at 1614 (1965).

1975 - Herbert H. Howard, "The Contemporary Status of Television Group Ownership," Journalism Quarterly, 53:403) Autumn (1976).

1980 - Herbert H. Howard, Television Station Group Ownership: 1980, Knoxville: The University of Tennessee Communications Research Center--for the National Association of Broadcasters, 1982), p. 4.

1986 - See p. 7.

group-owned UHF stations has remained fairly constant because of the steady increase of new UHF facilities. This development and other current trends will be explored in this report.

The second aspect of this study focuses on newspaper ownership of television stations. In 1973, when the FCC examined the cross-media ownership issue, 16.1% of the commercial TV stations in the top-100 markets (60 of 372) were either licensed to or affiliated in ownership with a local daily newspaper.[6] By 1985, a dramatic decline in the co-ownership of newspaper-TV properties in the same market had occurred. At the same time, the overall

number of newspaper-television affiliations have increased due to the tendency of media companies to do business in both broadcasting and print enterprises. Only 31 TV stations, or 5.7% of the 559 outlets in the top-100 markets, were affiliated with co-located daily newspapers at the start of 1985.[7] However, 168 of those 559 stations, or 30.1%, were newspaper-related, compared with 28.0% in 1973.[8]

Method of Study

This study is based on a tabulation of new data on the ownership of television stations in the United States as of January 1, 1986. The author maintains files of TV station ownerships which are continuously updated from FCC announcements of license transfers, with further verification of ownership changes, as needed, by direct contact with stations involved. The rosters of stations credited to each group include all transfers of ownership that have been approved up to the first day of the new year. In some cases, the actual assumption of station operation by the new licensee may not yet have taken place. Televison Factbook No. 54 [1986 ed.][9] was the source of Arbitron's weekly circulation data. Percentages of the nation's TV households in each group's markets were obtained from Arbitron Ratings/Television (1985-86 Universe Estimates Summary).[10]

The various tables presented here use as a base the 595 TV stations (298 VHF and 297 UHF) determined to be operational in the 100 largest U. S. markets. Market rankings are those published by the Arbitron Company for 1985-86.[11] This list, based on the number of TV households in each ADI market, is revised annually.

resulting in slight changes from year-to-year in the composition of the top-100 markets.

The Findings

Again during 1985, group ownership of television stations continued its long-term expansion. Within the top-100 markets, 451 stations were group-owned on January 1, 1986, compared to 421 on the same date in 1985.[12] This increase of 30 stations occurred during a year in which the number of stations in the 100 largest markets increased by 36, from 559 to 595. The proliferation of new UHF independent stations was the principal factor contributing to the overall gain in station population in the top-100 markets. An additional factor was a two-way tie for 100th place, which resulted in an actual count of 101 markets this year, as well as some additional adjustments for the normal year-to-year shifting of markets at the lower margin of the top-100 rankings.

Not only did group ownership increase numerically, it also gained slightly on a percentage basis during 1985. Overall, the 451 group-owned stations represent 75.8% of the 595 VHF/UHF outlets in the top-100 (101) markets, compared with 75.3% at the beginning of 1985. However, the current percentage remains below the all-time high of 79.0% recorded in 1982, when the number of stations in the 100 largest markets was much smaller (420).[13]

The trend toward higher percentages of group ownership among VHF stations continued during the past year. Collectively, at the beginning of 1986, the groups operated 87.9% of the highly desirable VHF stations in the top-100 markets in 1986, compared with 85.0% in 1985 and 83.9% in 1984. Although group ownership

of UHF stations lags far behind VHF on a percentage basis, the increase was more dramatic in absolute numbers, rising from 134 in 1984 to 165 in 1985, and to 189 at the start of 1986. This increase of 55 stations in two years is not readily apparent in the percentage figures (63.6% in 1986 vs 62.5% in 1985 and 60.1% in 1984) because the number of UHF outlets in the top-100 markets grew at an astonishing rate from 223 in 1984 to 264 in 1985, and to 297 in 1986.

As shown in Table 1, group ownership predominates at every level within the top-100 markets for both VHF and UHF stations. Despite the prevalence of multiple ownership in these markets, a significant degree of diversity exists. More than 100 different organizations own the 451 group stations in the 100 largest markets. Furthermore, in markets of all sizes, some 180 different

TABLE 1

GROUP OWNERSHIP OF TV STATIONS BY MARKET RANK

January 1, 1986

Market Rank	VHF No.	VHF G/O	VHF %	UHF No.	UHF G/O	UHF %	VHF & UHF No.	VHF & UHF G/O	VHF & UHF %
1-10	42	41	97.6	63	34	54.0	105	75	71.4
1-25	98	91	92.9	114	69	60.5	212	160	75.5
26-50	67	61	91.0	67	47	70.1	134	108	80.6
51-75	76	61	80.3	58	36	62.1	134	97	72.4
76-100*	57	49	86.0	58	37	63.8	115	86	74.8
1-100	298	262	87.9	297	189	63.6	595	451	75.8

* Two markets, Peoria and Lansing, were tied for 100th place.

groups (excluding those that operate satellite transmitters only as repeater stations) owned completely or partially the licenses to 697 stations, an average of 3.9 per group.

Table 2 shows the number of groups that held the various number of TV stations allowed under the FCC's new "12-12-12 rule," which became effective on April 2, 1985. Significantly, nine owners held licenses for more than seven TV stations as 1986 began.

TABLE 2

GROUP OWNERSHIP BY NUMBER OF TV STATIONS

January 1, 1986

Stations Held	No. Groups	No. Stations
12	1	12
11	1	11
10	0	0
9	2	18
8	5	40
7	12	84
6	9	54
5	23	115
4	36	144
3	37	111
2	54	108
TOTAL:	180 (1)	697 (2)

(1) Excludes nine satellite-only groups (24 stations).

(2) Ownership of five stations is shared by two or more owners. Therefore, 692 different stations are included in this number.

Overall, 21 groups owned seven or more stations nine months after the liberalized ownership rule went into effect.[14]

Table 3 shows the highest and lowest rankings for groups with each of the possible numbers of stations. Disparities in rank and circulation exist between groups with equal numbers of stations. In addition to its number of stations, a group's economic potential also depends on the number of viewers its stations can reach (determined by market size and coverage), and the overall attractiveness of the programming offered. Therefore, the audience reach of a group's stations also needs to be considered.

TABLE 3

HIGH AND LOW CIRCULATION RANKINGS ON TV GROUPS* (1986)

No. Stations	Highest Rank	Lowest Rank
Twelve	6	—
Eleven	8	—
Ten	—	—
Nine	12	31
Eight	2	20
Seven	11	62
Six	1	91
Five	3	125
Four	19	162
Three	7	165
Two	40	163

* groups with complete circulation data

As in our previous studies, Arbitron's net weekly circulation (NWC) data have been used to determine the total weekly reach or circulation of each TV group. Using the NWC data published in Television Factbook No. 54 (1986), a circulation profile was developed for each of the 180 identified TV groups, based on station holdings (including transfers approved) on January 1, 1986. These groups, ranked according to their weekly circulation are shown in Appendix A.[15] The total percentage of the nation's TV households in each group's respective markets, based on the FCC's 25% formula, also are included. Appendix B lists the 100 largest ADI areas (1985-86) with their percentages of national TV households, the data used by the FCC to compute market percentages toward the 25% ceiling. With these data, one may "predict" what markets a group could add without exceeding the limit or what stations a newly merged group could divest to meet the 25% rule.

Further analysis of the Arbitron NWC data for the 180 television groups reveals the following industry profile:

1) Two groups now reach more than 20% of the nation's estimated 86,104,900 television households (1985-86). Only five groups reach as much as 15%, and only nine groups serve more than 10% of the nation's TV households. These firms include the three network owned-and-operated (O&O) groups and six large independent chains. This year, Tribune Co. moved from fifth to first place to become the group with the largest net weekly circulation (23.4%), followed by the newly merged Capital Cities/ABC O&O group (22.5%), CBS (18.3%), and NBC (18.0%). Fox Television (17.1%), formerly the Metromedia group, slipped from first to fifth place after selling its Boston station. The remaining groups with weekly circula-

tion exceeding 10% include Taft (12.6%); RKO General (11.4%); Kohlberg, Kravis & Roberts (10.9%); and Westinghouse (10.4%).

2) Nine groups now reach between 5% and 10% of the nation's TV households.[16] Sixteen groups reach between 2.5% and 5.0% of the estimated 86 million TV households, while 42 groups reach between 1.0% and 2.5%. Finally, 104 groups, or more than half (57.8%) of the total number of multiple-station licensees, reach less than 1.0% of the nation's television households each week. Of these 104 smaller operators, 70 have a weekly circulation of less than 500,000 households (0.6%) and 41 groups reach fewer than 250,000 homes (0.3%) on a weekly basis. The smallest group for which complete NWC data were available attracts only 88,800 viewing households weekly to its three TV stations.

The 25 highest ranking groups based on the FCC's new 25% formula (based on ADI market percentages of national TV households) are shown in Table 4. Household reach figures for all groups, using the FCC formula, are given in Appendix A. These percentages of the nation's TV households reached will determine how much growth any group may experience from the acquisition of additional stations, up to the new limit of 12 stations and 25% of the nation's television households. Two groups (Capital Cities/ABC and CBS) now exceed 20%, and three other groups (NBC, Tribune Broadcasting, and Fox TV) closely approach the 20% figure at this time. Five others fall between 10% and 14%, while nine groups reach 5% to 10% of the U.S. markets.

Noticeable differences exist between these rankings based on the FCC formula and those based on net weekly circulation. Even so, 22 group owners appear on both lists of the top-25

multiple station licensees. Differences between the two ranking systems result from such factors as (1) extensive cable carriage of certain independent stations; (2) ownership of several large market independent stations that engage in ethnic and religious programming; and (3) ownership of stations that have not yet been fully developed.

TABLE 4

PERCENTAGES OF THE NATION'S TV HOUSEHOLDS REACHED BY THE 25 LARGEST GROUPS USING FCC FORMULA

(January 1, 1986)

Rank	Group Owner	Number of Stations	% of U.S. TV HH	% TVHH with proposed purchases/sales
1.	Capital Cities/ABC	8	24.40	
2.	CBS	5	20.65	19.45
3.	NBC	5	19.77	20.94
4.	Tribune Co.	6	18.60	
5.	Fox Television (Murdoch)	6	18.13	
6.	RKO General	3	13.96	Eliminated
7.	Kohlberg, Kravis, Roberts	11	13.73	
8.	Taft	12	11.20	
9.	United/Chris Craft	7	10.32	
10.	Westinghouse	5	10.23	15.34
11.	Spanish International	7	9.33	
12.	Trinity	8	9.17	9.45
13.	Cox	8	8.91	
14.	Scripps-Howard	9	7.55	
15.	Gaylord	7	7.17	
16.	Hearst	6	6.98	
17.	Gannett	6	6.72	8.67
18.	Belo	5	5.62	
19.	Outlet (Rockefeller)	7	5.06	4.45
20.	Times-Mirror	7	4.73	3.94
21.	Post-Newsweek	4	4.70	
22.	Harriscope	5	4.54	
23.	Lin	7	4.52	
24.	Meredith	8	4.33	
25.	H&C Communications	5	4.02	4.63

Cross-Media Ownership

Two significant trends have prevailed for several years with respect to newspaper ownership of television stations. First, there has been a steady increase in the overall co-ownership of newspaper and TV properties. Second, a marked decline has occurred in local cross-media ownership of TV stations and daily newspapers in the top-100 markets.

As shown in Table 5, 176 of the 595 stations in the top-100 (101) markets were newspaper related at the beginning of 1986. This represents eight more newspaper-affiliated TV stations than a year ago. However, with the greater number of television stations broadcasting in 1986, the percentage of newspaper affiliated TV outlets dropped slightly, from 30.1% to 29.6%. The number of instances of local cross-media ownership between television stations and daily newspapers in the top-100 markets remained constant. On January 1, 1986, 31 stations, or 5.2%, were involved in local cross-media ownerships. On a long-term basis, this represents a decline of 29 stations since 1975 when 60 stations, or 16.1% of those in the 100 largest markets, were commonly owned with local dailies. With only three exceptions, the remaining 31 newspaper/television cross-ownerships involve VHF station properties.

As was the case last year, the two major trends involving newspaper-TV ownership appear to have stabilized.

TABLE 5

NEWSPAPER OWNERSHIP OF U.S. TELEVISION STATIONS

January 1, 1986

MARKET RANK	VHF			UHF			VHF & UHF		
	Total	No.	%	Total	No.	%	Total	No.	%
1-10 (1)	42	16	38.1	63	5	7.9	105	21	20.0
1-25 (2)	98	40	40.8	114	11	9.7	212	51	24.1
26-50 (3)	67	35	52.2	67	12	17.9	134	47	35.1
51-74 (4)	76	36	47.4	58	7	12.1	134	43	32.1
75-100 (5)	57	25	43.9	58	10	17.2	115	35	30.4
1-100 (6)	298	136	45.6	297	40	13.5	595	176	29.6

NOTES: 1) 5 VHF stations are cross-owned with local newspapers in the top-10 markets.

2) 9 VHF stations are cross-owned with local newspapers in markets 1-25.

3) 8 VHF and 1 UHF stations are cross-owned with local newspapers in markets 26-50.

4) 5 VHF stations are cross-owned with local newspapers in markets 51-75.

5) 6 VHF and 2 UHF stations are cross-owned with local newspapers in markets 76-100.

6) 28 VHF and 3 UHF stations are cross-owned with local newspapers in the top-100 markets.

ENDNOTES

1 Amendment of Multiple Ownership Rules, 9 R.R. 1563 (1953); Television Multiple Ownership Rule Amended, 1 R.R. 1519 (1954).

2 50 F.R. 4666 (1985).

3 The final order also included a proviso that a group may acquire up to 14 broadcast facilities (radio or television), provided at least two of the stations in the portfolio are minority-controlled.

4 FCC Order 84-A (1943); FCC Order 84-B (1944).

5 Second Report and Order (Docket 18110), 32 R.R. 2d 954 (1975).

6 Herbert H. Howard, Group and Cross-Media Ownership of Television Stations: 1984. (Washington: National Association of Broadcasters, 1984), p. 11.

7 Herbert H. Howard, Group and Cross-Media Ownership of Television Stations: 1985. (Washington: National Association of Broadcasters, 1985), p. 14.

8 Ibid, p. 13.

9 Television Factbook No. 54. (Washington: Television Digest, Inc., 1986).

10 Arbitron Ratings/Television (1985-86 Universe Estimates Summary). (New York: Arbitron Ratings Company, 1985).

11 ADI Market Rankings 1985-86. (New York: The Arbitron Co., 1985). The composition of the top-100 markets varies slightly from year-to-year due to different growth rates among the markets and the shifting of "swing" counties from one market to another. For analytical purposes, however, the effect of these differences is negligible.

12 Numerous ownership changes occurred just before and just after January 1, 1986. Data on the 25 highest-ranking groups include the following 1985 station acquisitions and/or transfer

approvals:

a) KTLA, Los Angeles, by Tribune Co.;
b) Following their merger, these stations became the O&O properties of Capital Cities/ABC: WABC-TV, New York; KABC-TV, Los Angeles; WLS-TV, Chicago; WPVI-TV, Philadelphia; KGO-TV, San Francisco; KTRK, Houston; WTVD, Raleigh-Durham; and KFSN, Fresno;
c) These stations were approved for transfer in 1985 from Metromedia to Fox Television: WNEW-TV (WNYW), New York; KTTV, Los Angeles; WFLD-TV, Chicago; WTTG, Washington; KRIV, Houston; and KRLD (KDAF), Dallas. Actual assumption of operations by Fox did not begin until 1986.
d) Taft Broadcasting acquired these stations from Gulf Broadcasting during 1985: WTSP-TV, Tampa-St. Petersburg; WGHP-TV, High Point-Greensboro-Winston/Salem; KTSP-TV, Phoenix; KTXH, Houston; and KTXA, Dallas.
e) Kohlberg, Kravis & Roberts acquired these properties through a buyout of Storer Communications: WAGA-TV, Atlanta; WTVG, Toledo; WITI-TV, Milwaukee; WJBK-TV, Detroit; WJKW-TV, Cleveland; and KCST-TV, San Diego.
f) Cox Communications, which went private during 1985, acquired WFTV, Orlando.
g) KUTP-TV, Phoenix, was added to the United/Chris-Craft group.
h) During 1986, Scripps-Howard acquired KNXV-TV, Phoenix; WFTS-TV, Tampa-St.Petersburg; and WXYZ-TV, Detroit.
i) Hearst acquired WCVB-TV, Boston.
j) Meredith acquired KVVU-TV, Las Vegas.

The following transfers involving the 25 largest groups, announced during 1985, are not included in this report since the FCC's approvals did not occur before January 1, 1986. Resulting changes in percentage of the nation's TV households covered (FCC formula) are shown in Table 4.

a) Sale of KMOX-TV, St. Louis, by CBS to Viacom, Inc.
b) Acquisition of NBC and its O&O stations by General Electric Co. Following that merger, KGNC, Denver, owned by GE, will be added to the NBC O&O group.
c) RKO General's proposed sale of KHJ-TV to Westinghouse and its proposed sale of WOR-TV, New York, to MCA.
d) Gannett's acquisition of WDVM, Washington, and KVUE-TV, Austin, from Evening News Association. Also, its spinoff of three other Evening News stations to Knight-Ridder: WALA-TV, Mobile; KOLD-TV, Tucson; and KTVY, Oklahoma City.
e) H&C Communications' acquisition of KSAT-TV, San Antonio from Outlet Communications.
f) Trinity's purchase of WLXI-TV, Greensboro, N.C.
g) Times-Mirror Co.'s sale of WSTM, Syracuse; WETM, Elmira, N.Y.; and WHTM, Harrisburg, Pa.

13

Herbert H. Howard, Television Station Group Ownership and Cross-Media Ownership: 1982. (Washington: National Association of Broadcasters, 1982), p. 4.

14

Groups with seven or more stations as of 1/1/86 included: Adams TV (7); ABC/Capital Cities (8); Bahakel (7); Cox (8); Gaylord (7); Gillette (9); Kohlberg, Kravis & Roberts (11); Lee (7); Lin (7); Media Central (8); Meredith (8); Outlet (7); Park (7); Pulitzer (7); Scripps-Howard (9); Spanish International (7); Standard Communications (7); Taft (12); Times-Mirror (7); Trinity (8); and United/Chris Craft (7).

15

New groups appearing in 1986 include Abell (57); Heritage (91); Citadel (97); Southwest Media (113); Grant (118); Burnham (124); Telepictures (139); Amaturo (140); Wooster Republican (144); Asbury Park Press (146); Corpus Christi (148); Reitan TV (158); Lloyd (159); Christian TV Network (165); United Cable (167); American Telecasters (170); Alden (171); and Tri-State Christian (172).

Significant gains in rank were made by these groups, primarily from the acquisition of additional stations (1985 and 1986 ranks): Tribune Broadcasting (4-1); Taft (10-6); Kohlberg, Kravis & Roberts (14-8); Scripps-Howard (17-12); Outlet (21-17); Gillette (51-31); Odyssey Partners (62-41); American Family (55-45); New York Times (64-48); Nationwide (63-51); and Price (117-77).

16

Groups reaching between 5% and 10% of the nation's TV households on a NWC basis include Cox (9.8%); United/Chris-Craft (8.3%); Scripps-Howard (8.0%); Gaylord (7.9%); Hearst (7.6%); Gannett (6.4%); A. H. Belo (5.3%); Outlet (5.1%); and Times-Mirror (5.0%).

APPENDIX A

TV STATION GROUPS RANKED BY NET WEEKLY CIRCULATION
WITH FCC FORMULA TV HOUSEHOLD COVERAGE (1-1-86)

Group Owner	Rank 1986	Rank 1984	No. of Sta'ns	Net Weekly Circulation	Percent of U.S. TV Households NWC	Percent of U.S. TV Households FCC
*Tribune Co.	1	4	6	20,164,000	23.4	18.60
*Capital Cities/ABC	2	2	8	19,381,500	22.5	24.40
CBS	3	3	5	15,764,300	18.3	20.65
NBC	4	5	5	15,481,100	18.0	19.77
Fox (Murdoch)	5	1	6	14,735,400	17.1	18.13
Taft	6	10	12	10,835,400	12.6	11.20
RKO General	7	7	3	9,785,100	11.4	13.96
+Kohlberg, Kravis & Roberts	8	14	11	9,409,300	10.9	13.73
Westinghouse	9	6	5	8,969,600	10.4	10.23
*Cox	10	8	8	8,412,300	9.8	8.91
+United/Chris-Craft	11	11	7	7,182,900	8.3	10.32
*Scripps-Howard	12	17	9	6,850,300	8.0	7.55
*Gaylord	13	12	7	6,763,700	7.9	7.17
*Hearst	14	16	6	6,501,900	7.6	6.98
*Gannett	15	15	6	5,501,200	6.4	6.72
*A. H. Belo	16	18	5	4,587,200	5.3	5.62
Outlet	17	21	7	4,379,800	5.1	5.06
*Times-Mirror	18	19	7	4,336,600	5.0	4.73

GROUPS WITH 2.5% TO 5.0%
PENETRATION OF THE U. S. TV MARKET (NWC)

*Post-Newsweek	19	20	4	4,237,600	4.9	4.70
*Meredith	20	23	8	4,127,000	4.8	4.33
Lin	21	22	7	4,096,300	4.8	4.52
*Pulitzer	22	25	7	3,442.300	4.0	3.02
H & C Communic.	23	26	5	3,235,900	3.8	4.02
*Albritton	24	27	5	3,044,500	3.5	3.44
*Evening News	25	29	5	5,027,500	3.5	3.48
*Knight-Ridder	26	28	6	2,951,800	3.4	3.08
*Chronicle Broadcasting	27	32	4	2,713,200	3.2	3.69
Cosmos	28	30	6	2,707,200	3.1	2.42
*Multimedia	29	31	5	2,697,800	3.1	3.06
McGraw-Hill	30	33	4	2,511,900	2.9	3.09
Gillette	31	51	9	2,396,200	2.8	2.51
Hubbard	32	35	5	2,319,700	2.7	2.51
King	33	34	4	2,297,600	2.7	2.81
*Park	34	36	7	2,183,000	2.5	2.15

GROUPS WITH 1.0% TO 2.5%
PENETRATION OF THE U.S. TV MARKET (NWC)

*Providence Journal	35	39	3	1,958,900	2.3	2.10
CBN Group	36	38	3	1,949,500	2.3	2.35
Viacom	37	37	4	1,894,500	2.2	1.94
*Harte-Hanks	38	40	4	1,814,900	2.1	1.98
+*Lee	38	48	7	1,814,900	2.1	2.12
Fisher	40	41	2	1,789,000	2.1	2.27
Odyssey Ptnrs.	41	62	5	1,773,200	2.1	1.91

Adams TV	42	43	7	1,768,900	2.1	1.37
Kelly	43	44	2	1,733,300	2.0	2.43
TV Station Partners	44	42	5	1,728,900	2.0	1.33
American Family	45	55	6	1,666,200	1.9	1.57
Camellia City	46	60	3	1,636,700	1.9	1.57
Malrite	47	45	4	1,615,100	1.9	1.09
*New York Times	48	64	4	1,613,100	1.9	1.23
*Bonneville	49	46	2	1,554,900	1.8	2.05
*Columbus Dispatch	50	47	2	1,562,600	1.8	1.70
Nationwide	51	63	4	1,533,700	1.8	2.06
*Media General	52	49	3	1,514,800	1.8	1.71
Midwest Comm.	53	50	3	1,500,800	1.7	1.77
Koplar	54	53	2	1,447,700	1.7	1.73
Commercial Radio Institute	55	66	3	1,360,900	1.6	1.61
Gateway	56	54	4	1,338,500	1.6	1.43
*Abell	57	—	2	1,334,000	1.5	1.26
*Freedom Nprs.	58	56	4	1,327,100	1.5	1.33
Rollins	59	67	4	1,311,900	1.5	1.71
*Standard Comm.	60	57	7	1,306,600	1.5	1.36
+Midwest TV	61	59	4	1,278,100	1.5	1.43
Bahakel	62	58	7	1,256,500	1.5	1.18
*Forward Comm.	63	52	5	1,207,200	1.4	0.78
*Milwaukee Journal	64	65	3	1,134,100	1.3	1.20
*Jefferson-Pilot	65	68	2	1,109,000	1.3	1.23
*Guy Gannett	66	76	4	1,102,800	1.3	1.07
Wilson	67	71	4	1,099,000	1.3	1.47

Spartan Radio	68	69	3	1,077,100	1.3	1.03
*Morgan Murphy	69	70	5	1,012,800	1.2	1.03
Ackerley	70	82	5	990,300	1.2	2.13
Arlington	71	74	3	988,300	1.1	1.86
+Spanish Int'l.	72	77	7	961,000	1.1	9.33
Loyola U. (S)	73	73	2	959,900	1.1	0.97
Charles Woods	74	83	5	915,500	1.0	1.24
+TVX Group	75	79	4	904,300	1.0	1.30
*South Bend Tribune	76	75	3	896,100	1.0	0.67

GROUPS WITH LESS THAN 1.0% PENETRATION (NWC)

Price	77	117	3	804,600	0.9	0.98
*Quincy Nprs.	78	80	4	789,800	0.9	0.63
*News-Press & Gazette	79	88	5	752,400	0.9	0.81
*Clay	80	85	4	751,700	0.9	0.70
*Landmark	81	86	2	722,900	0.8	2.63
Palmer	82	78	2	716,100	0.8	0.82
Bostick/LBJ	83	90	4	712,800	0.8	0.58
+Blair TV	84	92	5	692,900	0.8	1.49
Channel Comm.	85	125	2	686,200	0.8	0.89
Benedek (X)	86	105	4	668,300	0.8	0.40
Toledo Blade	87	99	4	665,000	0.8	0.55
Gilmore	88	89	3	664,900	0.8	0.57
May Co.	89	91	2	664,700	0.8	0.74
Pappas TV	90	127	2	656,900	0.8	0.58
Heritage (X)	91	—	6	651,100	0.8	0.64
+Media Central	92	145	8	645,800	0.8	2.06
Backe Communic.	93	93	2	626,400	0.7	0.44

R. Dudley (X)	94	107	2	624,000	0.7	0.44
Glazier	94	94	3	624,000	0.7	0.45
Buford	96	96	4	623,100	0.7	0.51
Citadel	97	—	3	601,100	0.7	0.66
R. E. Shively	98	153	5	589,300	0.7	0.67
*Birney Imes	99	95	3	588,900	0.7	2.61
*Manship	100	98	2	587,100	0.7	0.50
McKinnon	101	118	3	572,600	0.7	0.58
Harriscope	102	81	5	570,800	0.7	4.54
+SFN Co.	103	61	3	536,600	0.6	0.45
Harron	104	102	2	536,000	0.6	0.49
*Evening Post	105	101	3	535,000	0.6	0.67
+Shamrock	106	140	5	533,700	0.6	0.29
*Gray	107	97	3	528,100	0.6	0.45
Wisconsin TV Network	108	87	4	527,800	0.6	0.61
Precht	109	112	5	509,200	0.6	0.54
J. C. Lewis	110	104	3	505,700	0.6	0.38
Maine Bcstg.	111	108	2	496,300	0.6	0.51
*Stauffer	112	106	3	481,700	0.6	0.48
Southwest Media	113	—	2	473,100	0.5	0.60
Sarkes Tarzian	114	109	2	472,400	0.5	0.54
Meridian Group	115	146	2	469,600	0.5	0.60
Retlaw	116	111	2	468,600	0.5	0.35
F. H. Spain	117	113	3	466,500	0.5	0.48
+Grant Comm.	118	—	3	448,700	0.5	3.93
Diversified (X)	119	144	3	447,200	0.5	0.27
*Lamco Comm.	120	115	2	434,100	0.5	0.37

Beam	121	150	5	396,900	0.5	0.38
Marsh Media	122	121	4	395,800	0.4	0.44
Mark III	123	163	3	391,400	0.4	0.70
+Burnham	124	—	3	385,000	0.4	0.42
SJL	125	141	5	381,900	0.4	0.66
Central Minnesota	126	124	3	370,100	0.4	0.34
Cannan	127	151	2	367,700	0.4	0.38
Great Trails	128	122	2	363,500	0.4	0.16
Eugene TV	129	123	4	358,600	0.4	0.36
Beach-Schmidt (Kansas)	130	120	3	344,200	0.4	0.49
Cal-Oregon	131	132	4	341,200	0.4	0.48
*Home News	132	130	2	338,300	0.4	0.28
Balaban/Plains	133	84	2	333,000	0.4	0.43
+*Worrell	134	131	3	316,700	0.4	0.15
*Lanford	135	138	3	315,600	0.4	1.11
R. H. Drewry	136	133	2	303,600	0.4	0.39
Draper	137	—	2	302,200	0.4	0.25
Columbia Empire	138	142	3	261,900	0.3	0.19
+Telepictures	139	—	5	254,700	0.3	0.41
Amaturo	140	—	4	248,500	0.3	0.30
Pikes Peak	141	148	2	246,600	0.3	0.33
Withers (XYZ)	142	162	4	244,200	0.3	0.18
+*Forum Co.	143	110	4	237,300	0.3	0.33
*Wooster Republican	144	—	2	224,800	0.3	0.25
Caprock	145	147	2	218,700	0.3	0.24
*Asbury Park Press	146	—	2	205,500	0.2	1.95

Seaway Comm.	147	154	2	205,100	0.2	0.33
Corpus Christi	148	—	2	186,700	0.2	0.24
NWG Bcstg.	149	155	3	184,100	0.2	0.10
+Trinity	150	172	8	178,400	0.2	9.17
Le Sea	151	157	2	172,500	0.2	0.64
*United (Kenosha)	152	158	2	171,800	0.2	0.12
Focus	153	176	2	170,600	0.2	0.71
Burke Bcstg.	154	159	4	155,500	0.2	0.08
Meyer	155	161	4	147,400	0.2	0.16
McAlister TV	156	162	2	141,900	0.2	0.09
Bismark TV	157	165	4	139,200	0.2	0.16
Reitan TV	158	—	4	139,200	0.2	0.16
+Lloyd	159	—	3	137,200	0.2	0.26
Green Group	160	128	2	135,700	0.2	1.59
Hi-Ho	161	160	2	123,700	0.1	0.13
Duhamel	162	164	4	122,600	0.1	0.11
Sigma	163	166	2	119,600	0.1	0.08
+Sante Fe	164	152	2	97,900	0.1	2.68
Christian TV Network	165	—	3	88,800	0.1	1.14
+Carolina Christian	166	170	4	72,800	0.1	0.69
+United Cable	167	—	2	49,300	0.06	1.08
+Sainte Bcstg.	168	173	4	44,500	0.05	0.82
+National Cap. Christian	169	175	2	43,600	0.05	1.12
+American Telecasters	170	—	2	22,800	0.03	0.43
+Alden	171	—	2	17,000	0.02	0.82

+Tri-State Christian	172	—	3	13,500	0.02	2.44
+J. R. Powley	173	—	2	12,200	0.01	0.59
+Life Anew	174	—	2	3,300	0.004	0.25
+Alaska TV	175	177	3	N. A.	N. A.	N. A.
+American Colonial	175	177	2	N. A.	N. A.	N. A.
+American Comm.	175	—	2	N. A.	N. A.	N. A.
+Hanna	175	—	2	N. A.	N. A.	N. A.
+Kearn	175	—	2	N. A.	N. A.	N. A.
+Northern TV	175		2	N. A.	N. A.	N. A.

Total Number of Groups—Exclusive of Satellite-Only Group Operations: 180

NOTES

\+ Circulation data for one or more stations were not available.

X Ownership of one or more stations is shared with another group.

* Designates groups that are owned by or are affiliated with a newspaper publishing company.

APPENDIX B

1985-86 ADI MARKET RANKINGS
AND PERCENT OF U.S. TV HOUSEHOLDS
TOP-100 MARKETS

1985-86 Arbitron Television Markets and Ranking Guide

ADI Rank	Market	% of U.S.
1	New York	7.78
2	Los Angeles	5.11
3	Chicago	3.49
4	Philadelphia	3.07
5	San Francisco	2.37
6	Boston	2.33
7	Detroit	1.93
8	Dallas-Ft. Worth	1.79
9	Washington, D.C.	1.77
10	Houston	1.65
11	Cleveland	1.62
12	Pittsburgh	1.44
13	Seattle-Tacoma	1.37
14	Miami	1.36
15	Atlanta	1.36
16	Minneapolis-St. Paul	1.35
17	Tampa-St. Petersburg	1.23
18	St. Louis	1.20
19	Denver	1.17
20	Sacramento-Stockton	1.06
21	Baltimore	1.02
22	Phoenix	.96
23	Indianapolis	.95
24	Hartford-New Haven	.94
25	Portland, OR	.90
26	San Diego	.89
27	Orlando-Daytona Beach-Melbourne	.83
28	Milwaukee	.81
29	Cincinnati	.80
30	Kansas City	.80
31	Nashville	.77
32	Charlotte	.76
33	Columbus, OH	.75
34	New Orleans	.74
35	Buffalo	.71
36	Oklahoma City	.71
37	Greenville-Spartanburg-Asheville	.70
38	Raleigh-Durham	.70
39	Salt Lake City	.68
40	Memphis	.67

41	Grand Rapids-Kalamazoo-Battle Creek	.67
42	Providence-New Bedford	.65
43	Charleston-Huntington	.61
44	Harrisburg-York-Lancaster-Lebanon	.61
45	San Antonio	.61
46	Norfolk-Portsmouth-Newport News-Hampton	.59
47	Birmingham	.59
48	Dayton	.58
49	Louisville	.58
50	Greensboro-Winston Salem-High Point	.57
51	Albany-Schenectady-Troy	.56
52	Tulsa	.53
53	Shreveport-Texarkana	.51
54	Flint-Saginaw-Bay City	.51
55	Little Rock	.51
56	West Palm Beach-Ft. Pierce-Vero Bch.	.50
57	Mobile-Pensacola	.49
58	Wilkes Barre-Scranton	.49
59	Wichita-Hutchison	.49
60	Knoxville	.49
61	Jacksonville	.47
62	Albuquerque	.47
63	Richmond	.47
64	Fresno-Visalia	.46
65	Toledo	.44
66	Des Moines	.44
67	Syracuse	.43
68	Green Bay	.42
69	Springfield-Decatur-Champaign	.41
70	Omaha	.41
71	Rochester, NY	.40
72	Roanoke-Lynchburg	.39
73	Cedar Rapids-Waterloo-Dubuque	.38
74	Davenport-Rock Island-Moline	.38
75	Paducah-Cape Girardeau-Harrisburg-Marion	.37
76	Portland-Poland Spring	.37
77	Lexington	.36
78	Spokane	.36
79	Austin, TX	.36
80	Chattanooga	.35
81	Johnstown-Altoona	.33
82	Tucson	.33
83	Springfield, MO	.33
84	South Bend-Elkhart	.32
85	Jackson, MS	.32
86	Bristol-Johnson City-Kingsport	.32
87	Columbia, SC	.31
88	Evansville	.30
89	Huntsville-Decatur-Florence	.30

90	Lincoln-Hastings-Kearney	.30
91	Baton Rouge	.30
92	Youngstown	.27
93	Fort Wayne	.27
94	Waco-Temple	.26
95	Sioux Falls-Mitchell	.26
96	Las Vegas	.26
97	Greenville-New Bern-Washington	.26
98	Burlington-Plattsburg	.25
99	Colorado Springs-Pueblo	.25
100	Lansing	.25
100	Peoria	.25